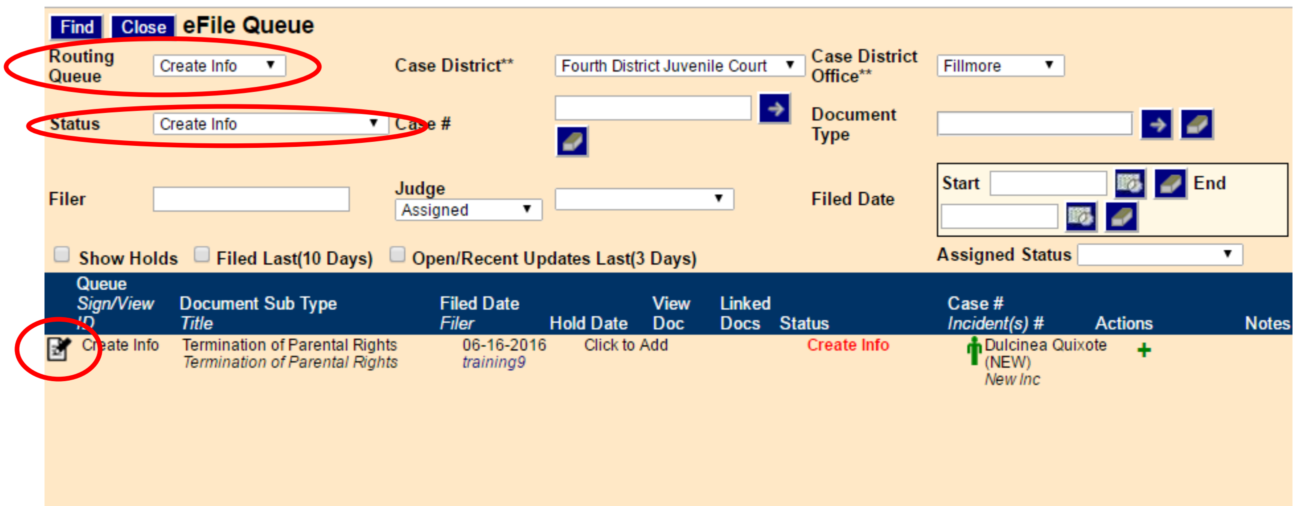
How Do I – *Clerical Processing Incidents on New Cases*

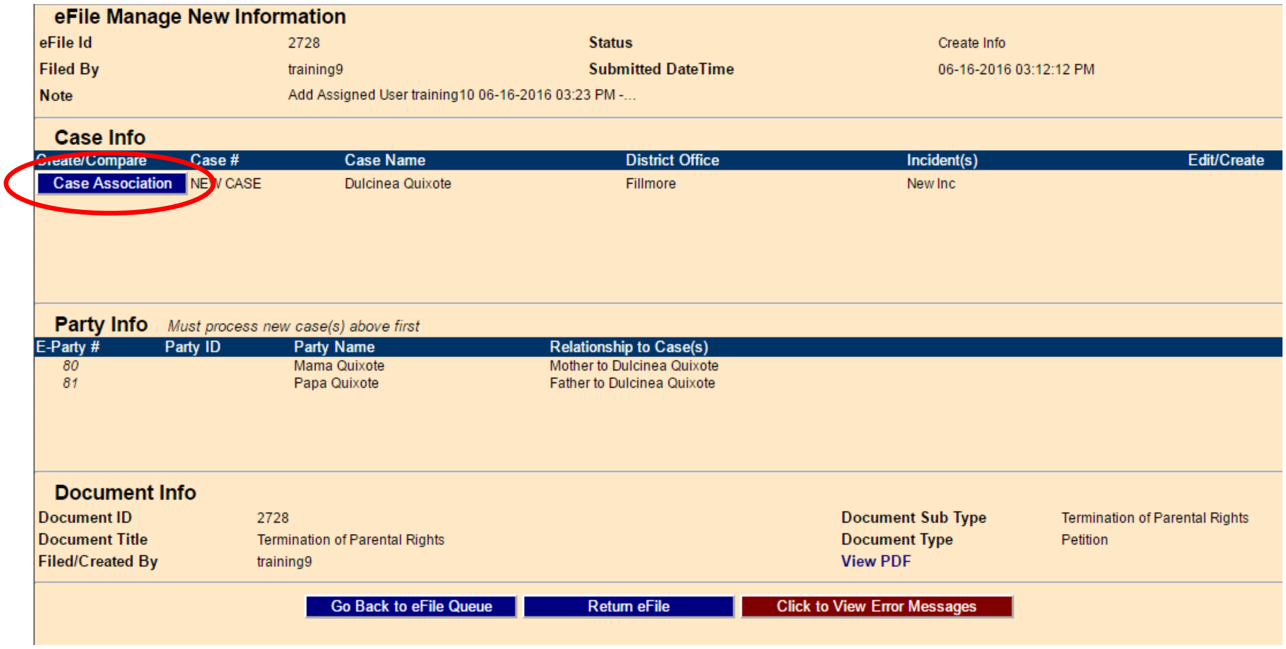
Phase II eFiling

In Phase II of eFiling, attorneys will create "pseudo" cases and incidents that will later be verified by the clerical department prior to creating the case and/or incident. These cases will appear in the queue with the status of "Create Info." At this point, the case has not been assigned a case number and it has not officially been created. These cases should be treated as a high priority. In order to view only these high-priority cases, apply the filters by selecting "Create Info" in the Routing Queue and Status Queue.

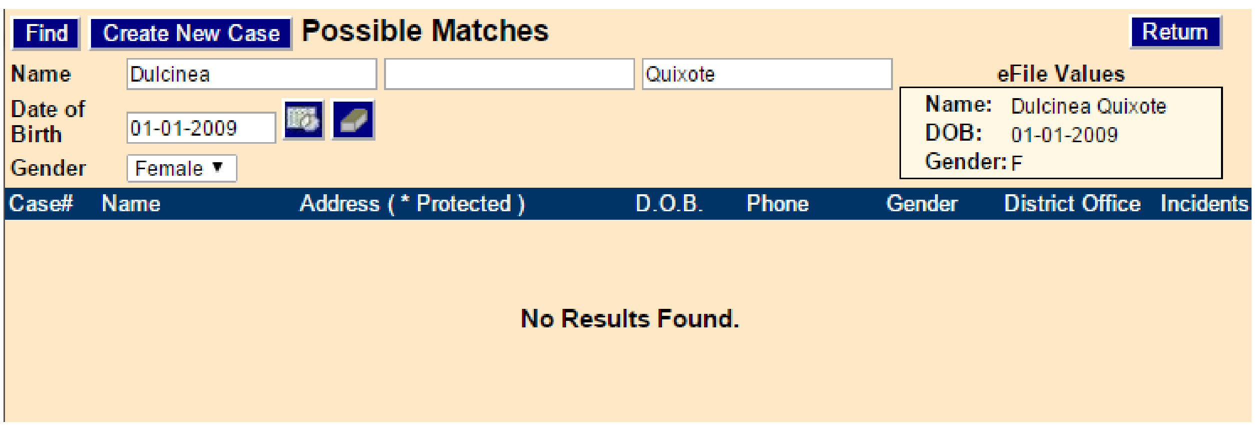
To process the new case, click on the "edit" icon on the left-hand side of the window.



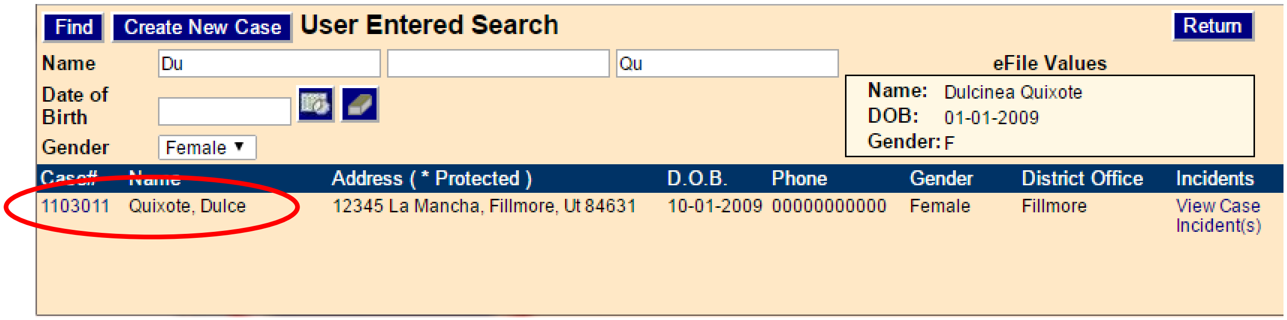
Please note, that the case will be automatically assigned to you once you click "Create Info" in order to avoid two people entering information on a new case at the same time. Once the process is complete, you will remain assigned to the case unless you take your take yourself off of the case. Click on "Case Association" to start.



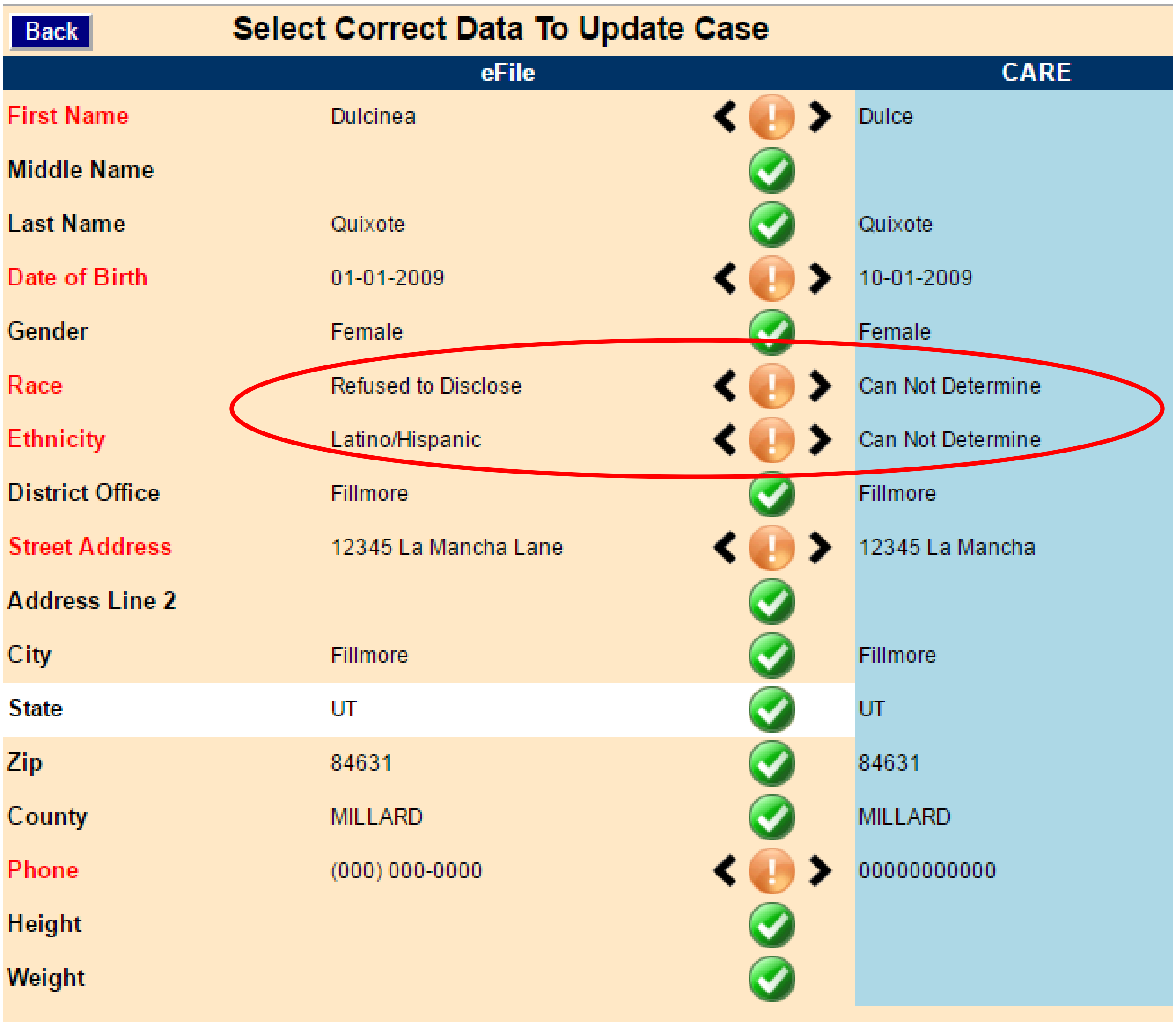
The next screen auto-fills the text boxes with the data that the attorney entered. Click “find” to see any possible matches. If no match exists, attempt the search again with just the first two letters of the first and last name. (CARE does not allow for a “closest match” search so if a similar name exists it will not show unless you remove some of the search criteria. If the attorney has mispelled the name, this could result in duplicate cases being created.)



When some criteria is removed, you may find a possible match. (If no possible match exists, click on “Create New Case.”) If there is a possible match, click on the existing case number to verify the identity of the individual.



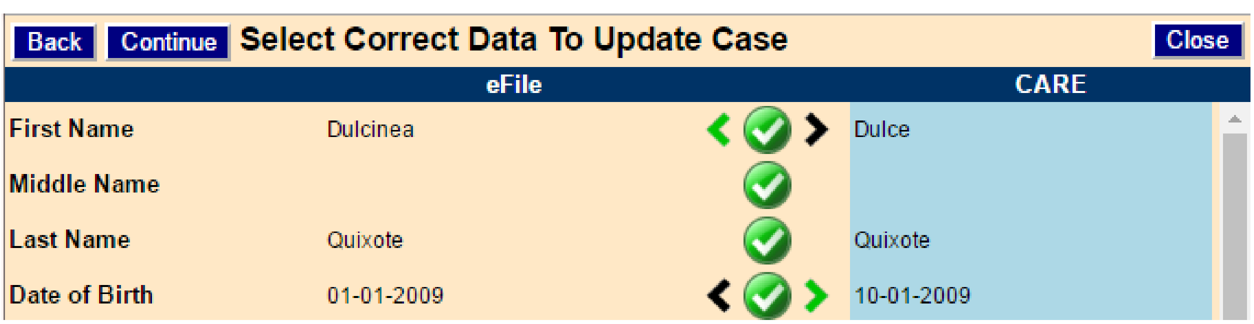
The next screen will show the case information side-by-side. Any discrepancies will display with an orange button. You will need to select the correct information before continuing. If after viewing this screen, you question whether or not this is the same individual, click "back" and continue creating a new case.



Back **Select Correct Data To Update Case**

	eFile	CARE
First Name	Dulcinea	Dulce
Middle Name		
Last Name	Quixote	Quixote
Date of Birth	01-01-2009	10-01-2009
Gender	Female	Female
Race	Refused to Disclose	Can Not Determine
Ethnicity	Latino/Hispanic	Can Not Determine
District Office	Fillmore	Fillmore
Street Address	12345 La Mancha Lane	12345 La Mancha
Address Line 2		
City	Fillmore	Fillmore
State	UT	UT
Zip	84631	84631
County	MILLARD	MILLARD
Phone	(000) 000-0000	00000000000
Height		
Weight		

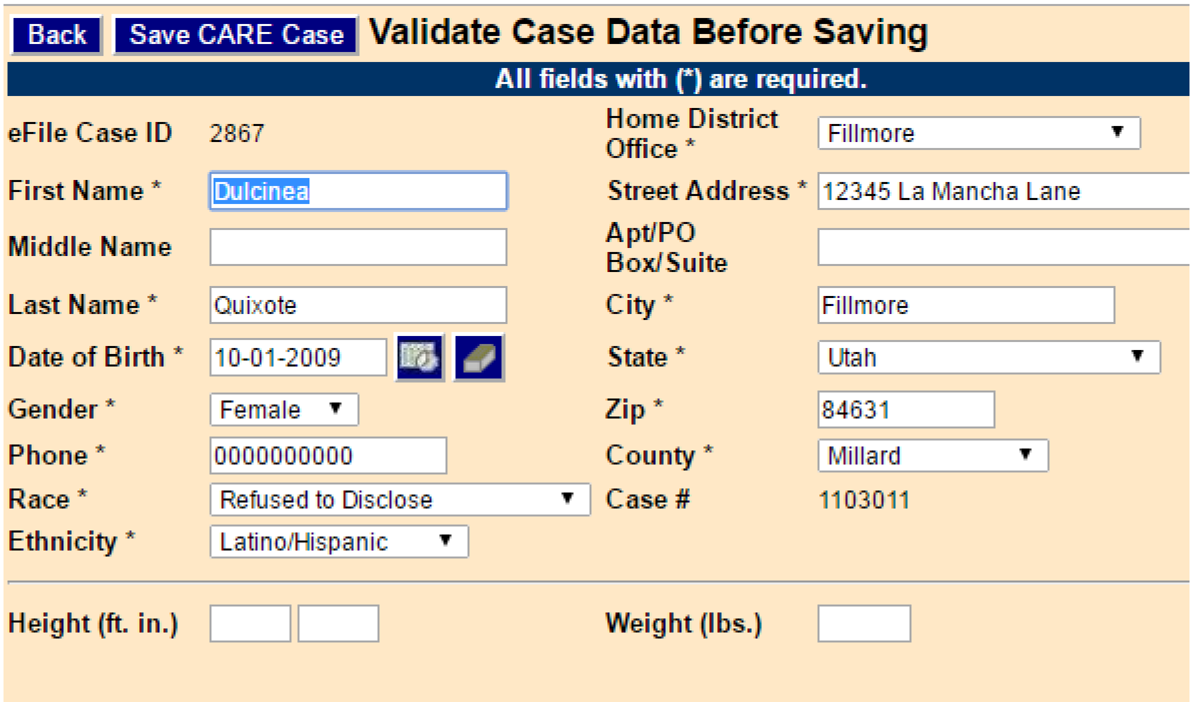
Select the arrows that point to the information that you believe is correct. In order to proceed, you will need to clear all of the orange buttons. Once everything is green, the "continue" button will appear. Click "continue."



Back Continue **Select Correct Data To Update Case** Close

	eFile	CARE
First Name	Dulcinea	Dulce
Middle Name		
Last Name	Quixote	Quixote
Date of Birth	01-01-2009	10-01-2009

Validate the case data one last time and click the "Save CARE Case" button.



Back | Save CARE Case | **Validate Case Data Before Saving**

All fields with (*) are required.

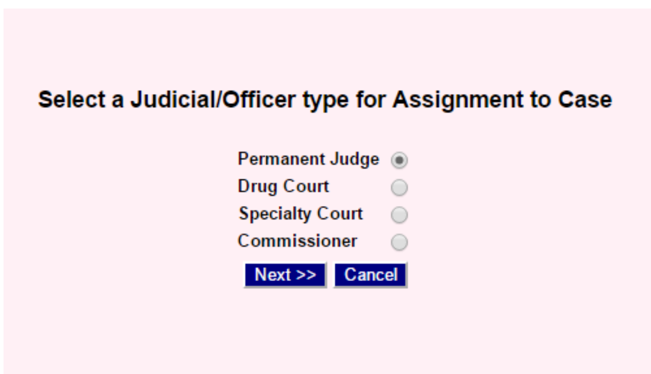
eFile Case ID	2867	Home District Office *	Fillmore
First Name *	Dulcinea	Street Address *	12345 La Mancha Lane
Middle Name		Apt/PO Box/Suite	
Last Name *	Quixote	City *	Fillmore
Date of Birth *	10-01-2009	State *	Utah
Gender *	Female	Zip *	84631
Phone *	0000000000	County *	Millard
Race *	Refused to Disclose	Case #	1103011
Ethnicity *	Latino/Hispanic		
Height (ft. in.)		Weight (lbs.)	

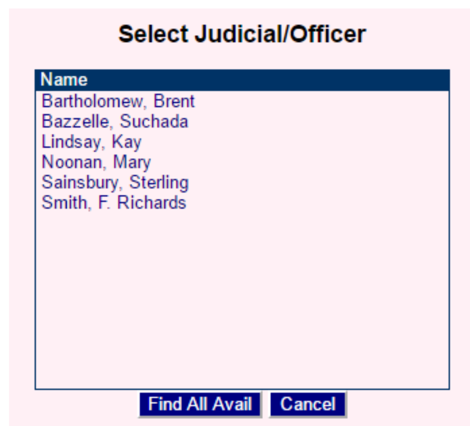
On the following screen, you'll need to assign the firm, the judicial officer, and create the incident. Start by clicking "Assign Firm."

The pop-up window displays the attorney firm that submitted the case/incident/document by default. Verify that the information is correct and select "Assign Firm to Case."

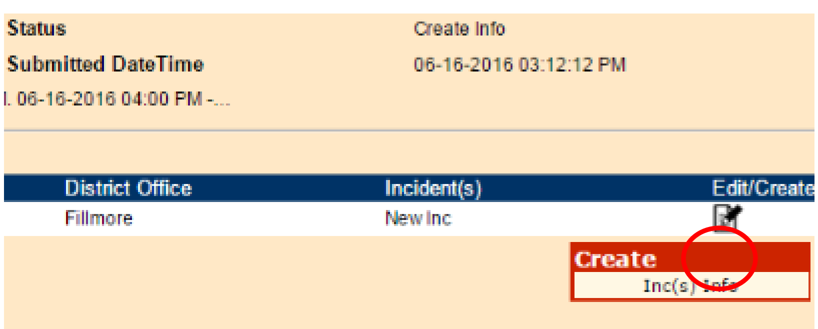
Click on the red gavel to add the judicial assignment.

Select the type of Judicial Officer assignment and then select the Judge. If the Judge is not showing up on the list, click on “Find All Avail” to see a list of all Judges in the state.



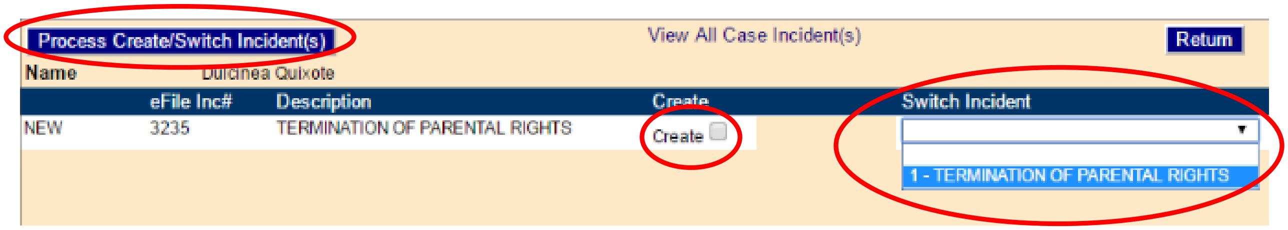


Click the “Edit/Create” icon to process the incident.

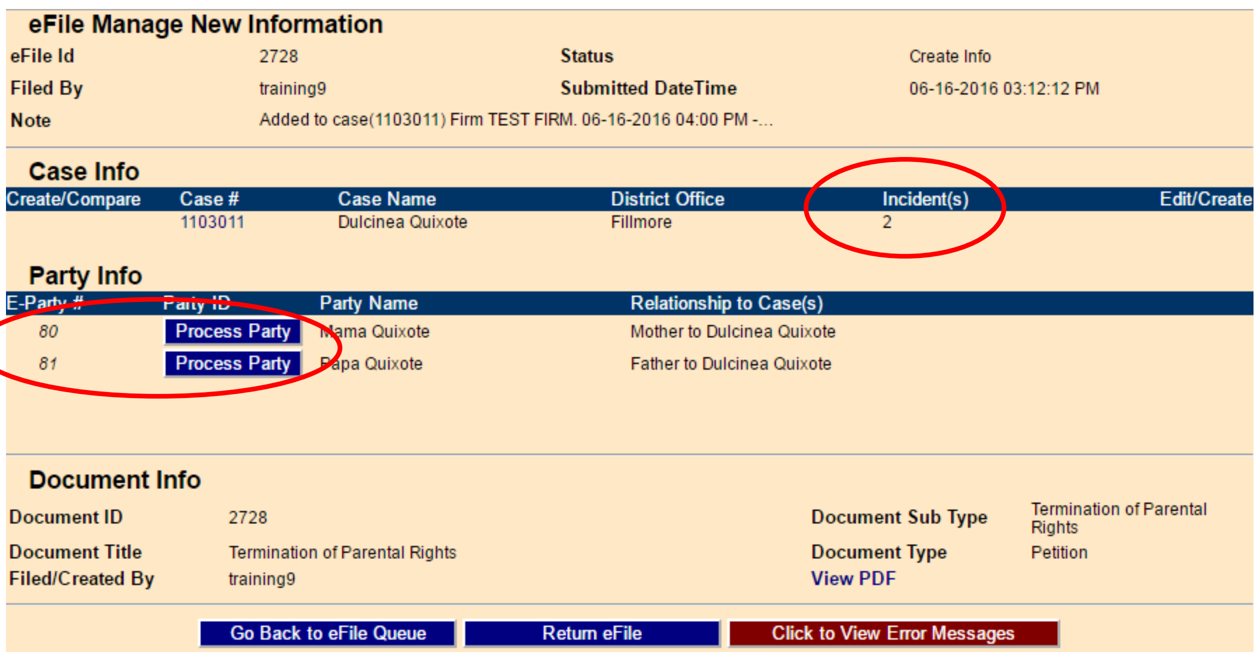


In this window, you can create the incident or switch the "pseudo" incident to an already-created incident. (Note: If no previously-created incidents exist, there will not be anything in the drop-down list.) You can also click the "View All Case Incident(s)" link to see the incident history on the case. In the *rare case* that the incident has already been created, select the existing incident from the "Switch Incident" drop-down list and then click the "Process Create/Switch Incident(s)" button.

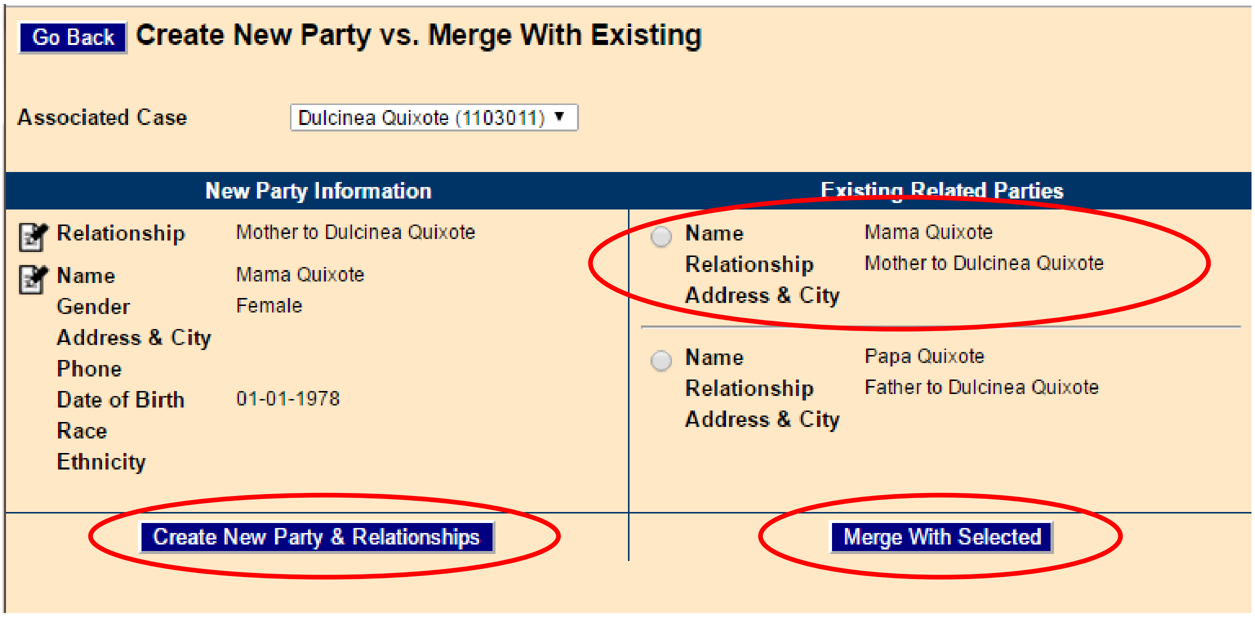
If no incident modification is needed, check the "create" box and then click the "Process Create/Switch Incident(s)" button.



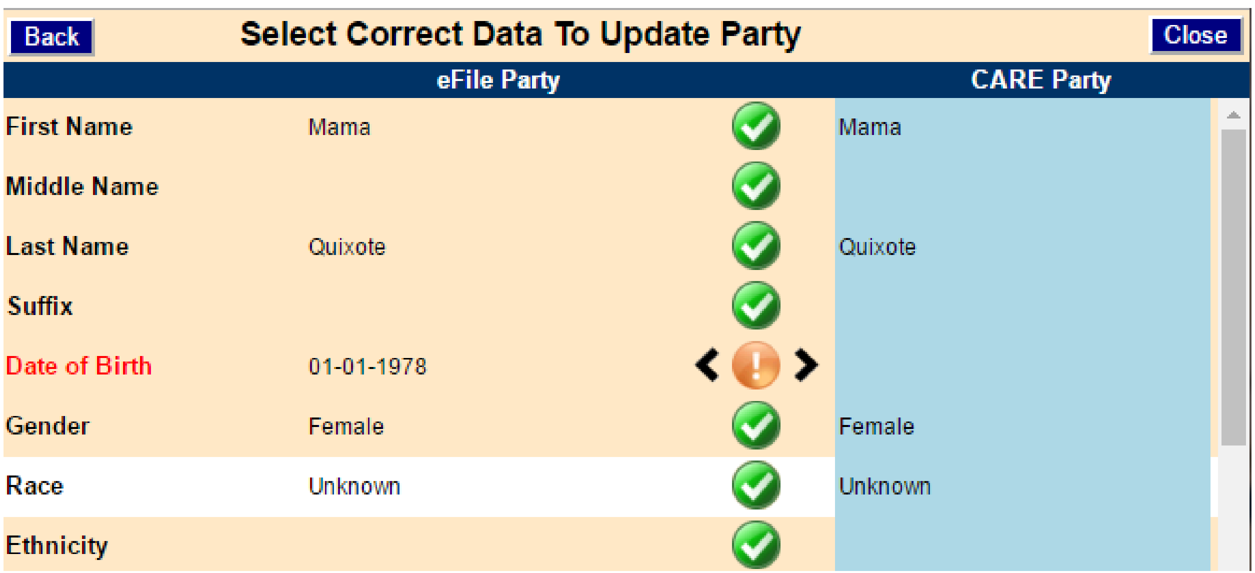
You will see that the incident has been created and assigned a number. The next step is to process the party information.



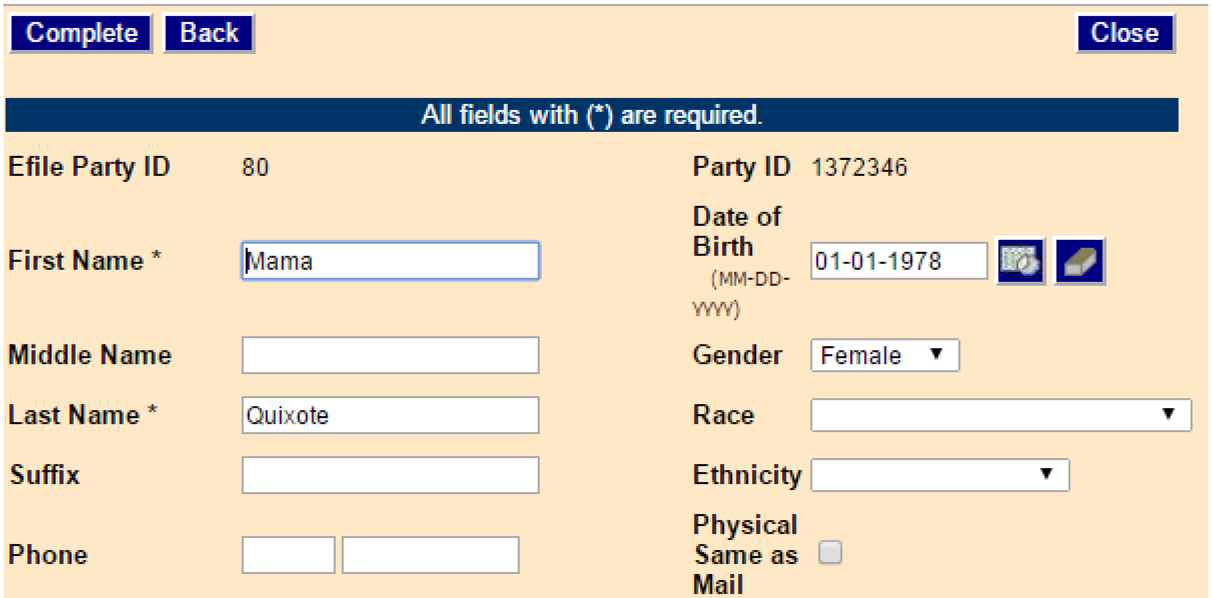
Clicking on the "Process Party" button will take you to the following window where you can create the new party or merge them with an existing party. If the suggested Existing Related Parties are not a match, click "Create New Party & Relationships." (Note, you can edit the party information and/or relationship prior to creation.) If there is an existing relationship on the case, you can select the appropriate party and click the "Merge with Selected" button.



You will need to validate the party information if merging to a current party. All buttons need to be green before you can proceed.



Validate the information one last time and click “complete.”

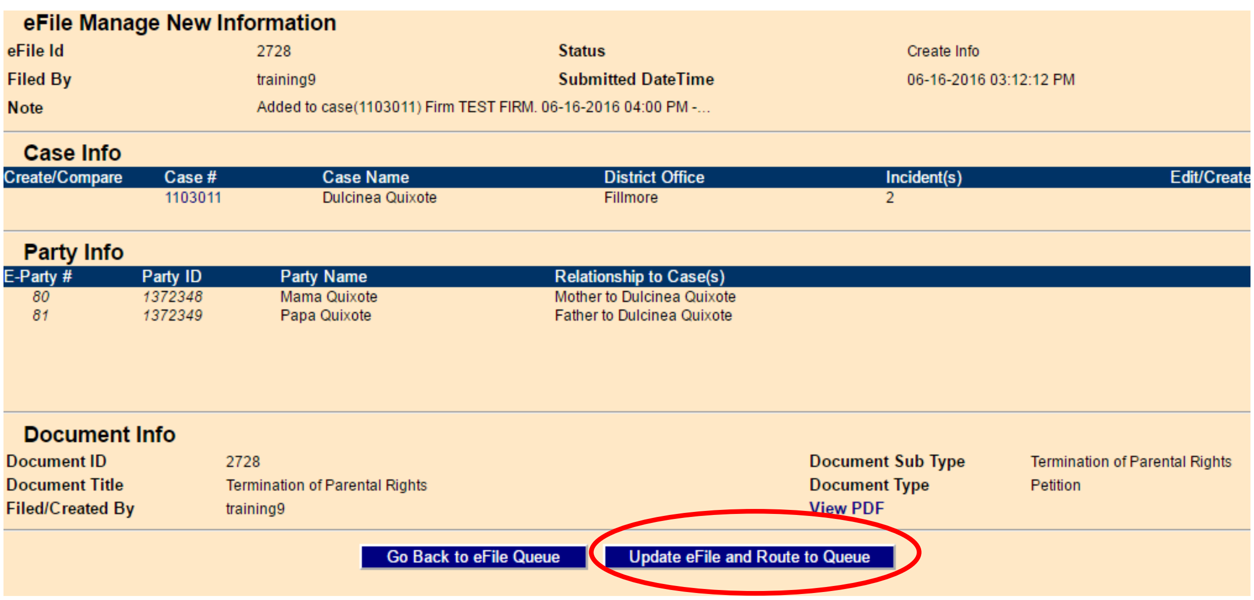


Complete Back Close

All fields with (*) are required.

Efile Party ID	80	Party ID	1372346
First Name *	Mama	Date of Birth (MM-DD-YYYY)	01-01-1978
Middle Name		Gender	Female
Last Name *	Quixote	Race	
Suffix		Ethnicity	
Phone		Physical Same as Mail	

With all information entered, the "Update eFile and Route to Queue" button appears. Click that button.



eFile Manage New Information

eFile Id	2728	Status	Create Info
Filed By	training9	Submitted DateTime	06-16-2016 03:12:12 PM
Note	Added to case(1103011) Firm TEST FIRM. 06-16-2016 04:00 PM -...		

Case Info

Create/Compare	Case #	Case Name	District Office	Incident(s)	Edit/Create
	1103011	Dulcinea Quixote	Fillmore	2	

Party Info

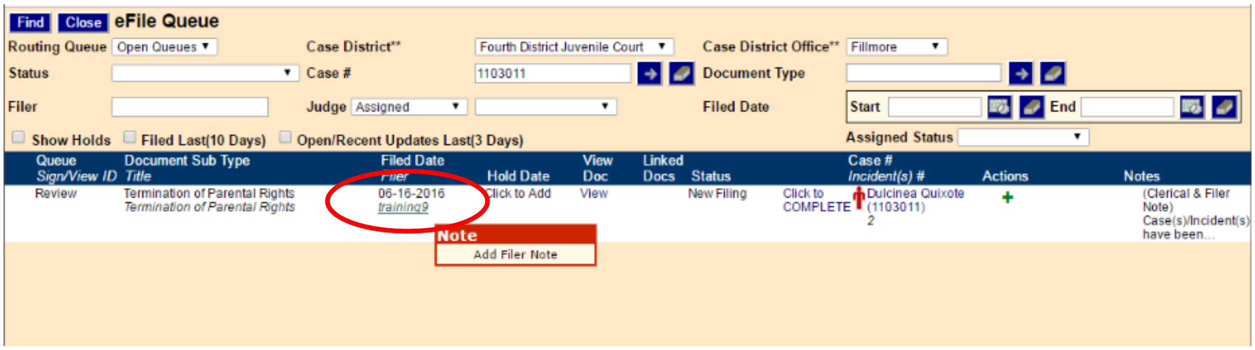
E-Party #	Party ID	Party Name	Relationship to Case(s)
80	1372348	Mama Quixote	Mother to Dulcinea Quixote
81	1372349	Papa Quixote	Father to Dulcinea Quixote

Document Info

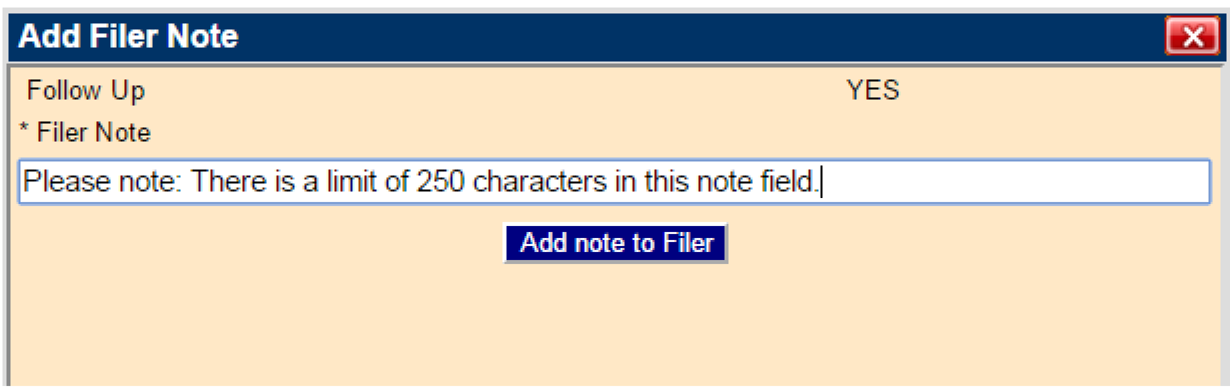
Document ID	2728	Document Sub Type	Termination of Parental Rights
Document Title	Termination of Parental Rights	Document Type	Petition
Filed/Created By	training9	View PDF	

Go Back to eFile Queue Update eFile and Route to Queue

Return to the eFile Queue to view the case. If you need to send the filer a message (requesting the filing fee etc.), click on the filer's name.



The pop-up window will allow you to write your message to the filer; there is a limit of 250 characters. The filer will only see this note if they view the case from their "My eFiled" screen. The filer will not be able to reply to your note via eFiling, it is a one-way message. You can also only add one note at a time. Adding a note will erase the previous note.



Once a note has been added, the case will be highlighted in yellow in the eFile Queue. If no further action is necessary (calendaring, notices, etc.), select "Click to Complete."